QGate

Paribus™

Version 1.4

Paribus for Sage CRM User Guide

Document Version 1.0

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Disclaimer

Although every effort has been made to ensure the processing performed by this software product will not damage or corrupt your data, we strongly recommend you perform the following actions to safeguard against such eventualities.

In the unlikely event that data becomes lost or corrupted, QGate Software Limited cannot be held responsible.

Recommended Safeguards

Perform a complete backup of any database(s) to which Paribus connects to obtain match data.

Note: Paribus does not alter any data in databases as part of the matching and review process. Changes are only made by subsequent updates via Paribus Plug-in Tools.

If possible, perform any match processes or updates using live databases outside of normal operational hours.

Table of Contents

Overview

This document will guide you through the usage of the Paribus for Sage CRM plug-in, a custom tool for managing your Sage CRM data based upon matched (duplicate) information established by the main Paribus application.

The guide outlines the following:

- About Paribus for Sage CRM
- Setting up and installing the Paribus for Sage CRM plug-in
- Identifying Matching Data in Sage CRM
- Reviewing your Sage CRM Match Results
- Processing Duplicate Sage CRM Records

Other Related Information

For information on installing and configuring the main Paribus application, see the Paribus Getting Started Guide.

For further information on using the Paribus application, see the Paribus product online help.

For up to date information on Paribus and other QGate products, please visit the QGate Software website at www.QGate.co.uk.

For additional reference information on Paribus, see the QGate Knowledgebase at http://knowledge.QGate.co.uk.

About Paribus for Sage CRM

Paribus for Sage CRM is an extension of the main Paribus application, providing custom integration with the Sage CRM system.

Contained within the main Paribus application, the Sage CRM integration provides direct access to your Sage CRM database for the processing of duplicate Sage CRM Companies and People identified by a Paribus matching process.

This integration includes:

Pre-defined Set of Paribus Match Definitions

Paribus Match Definitions are used in the Paribus matching processes to identify matching information (i.e. duplicate Companies/People).

A pre-defined set of Paribus Match Definitions, mapping to all the major data entities of a Sage CRM database model, are provided with the Paribus for Sage CRM integration.

These entities include:

- Company
- Person
- Address
- Telephone Numbers
- Websites and email Addresses

Furthermore, the Paribus application provides the ability to customise and/or add additional definitions as required.

Custom Component Plug-in for Processing Duplicates

Once Paribus has identified matching information (e.g. duplicate Companies and/or People) within your Sage CRM database, the Paribus for Sage CRM Custom Component provides a complete data management facility for processing duplicate records.

Processing/Removal of Duplicate Records

The processing of duplicate records is provided for both Sage CRM Companies and People, and includes the following features:

- Reassign (consolidate) all related information (i.e. Persons, Opportunities, Activities, etc) from duplicate records over to a nominated master record.
- Remove duplicate Companies/People.
- All database updates are fully synchronised.
- All updates support the Sage CRM security model
- All database updates are fully recorded in an audit report.

Pre-Requisites

This section outlines the elements required to set-up and use the Paribus for Sage CRM Plug-in.

In order for Paribus to be able to perform data merge operations, it needs to be able to:

1. Connect to Sage CRM.
2. Establish entity relationships (both System and Customised) for CRM Companies & People. These form a collection of Paribus Merge Rules, which define the "One to Many" data that should also be merged.
3. Have sufficient permissions and access to Sage CRM to perform merge operations on duplicate data.

To achieve this, Paribus for Sage CRM requires the following:

1. Paribus uses Sage CRM's Web Service interface for all communication and operations. This means that in order for Paribus to function, you will need to make sure that Sage CRM has Web Services enabled (see Page 11).
2. If you wish Paribus to automatically establish entity relationships from your Sage CRM database, Paribus requires that one of Sage CRM's system tables, ("Custom_Tables"), also be made accessible via the Web Services interface. This is achieved by an optional step in the "Installing the "Paribus for Sage CRM Support" Component" (see Page 12).

   Please Note: Depending on your network configuration, there may be security implications with exposing the "Custom_Tables" table to Web Services. This is because performing any data modification to this table could cause Sage CRM to behave unexpectedly. Paribus for Sage CRM only uses this table in a Read-Only operation, but other users could access it inappropriately. Please consult your Sage CRM network administrator for guidance on this feature.

   You can always undo this operation at a later date by re-applying the Paribus for Sage CRM support component and choosing not to expose the "Custom_Tables" table to Web Services.

   Alternatively, Paribus for Sage CRM comes with a pre-defined set of "out of the box" Paribus Merge Rules. However, these are based on a standard install of Sage CRM and will have no knowledge of any customisations that you may have in your database.
3. There are some Sage CRM tables that are not Web Service enabled by default. In order for Paribus to perform a complete data merge, these tables also need to be exposed to Web Services. This is achieved by the "Paribus for Sage CRM Support Component" (see Page 12). In addition, Paribus for Sage CRM requires a user account with sufficient admin permissions; otherwise it may not be able to perform merge operations successfully.

Client Workstation

- Installation of the main Paribus Application
  (see the Paribus Getting Started Guide)

Supported Sage CRM Versions

The Paribus for Sage CRM plug-in supports the following versions of Sage CRM:

- Sage CRM version 6.1 SP1 (and above)

  Note: Due to a known issue with Sage CRM 6.1; we would recommend upgrading Sage CRM to version 6.1h, as a minimum.

For more information on how to install Sage CRM service packs, please consult your Sage CRM documentation or Business Partner.

Important Notes:

The Paribus for Sage CRM plug-in is currently not compatible with the Sage 200/1000 Suite product line.

The Paribus for Sage CRM plug-in has not yet been confirmed to be compatible with SOLO configurations.

For more information on Paribus for Sage CRM plug-in compatibility, please see the QGate Knowledgebase at: **http://knowledge.QGate.co.uk**

Enabling Web Services

To enable Web Services in Sage CRM:

- In Sage CRM, go to: "**Administration** > **System** > **Web Services**"
- Click **Change**, and alter the settings below as follows:
- Set "**Enable web services**" = Yes
- Set "**Force web service log on**" = Yes
- Click **Save**, to save the settings.

Note: Enabling 'Make WSDL available to all' is not required in order to use the Paribus for Sage CRM plug-in. The plug-in will function in either state.

For the Paribus for Sage CRM Plug-in to use Web Services; you will need to have the Username/Password of either:

- The "Admin" user account, or
- A user with "admin" privileges (update/delete records) who has "**Allow Web Service Access**" = True.

NOTE:
Enabling Web Services for Sage CRM is a standard feature which exposes your Sage CRM data via a Web Services interface. This typically should not pose any adverse exposure to your data.

For more detailed information on the security implications of this feature, please consult your Sage CRM documentation or Business Partner.

Installing the "Paribus for Sage CRM Support" Component

In order to prepare your Sage CRM system to be used with Paribus for Sage CRM, you need to install the accompanying Sage CRM Component.

The Paribus for Sage CRM Support Component serves several functions:

1. It creates a Paribus system table in Sage CRM which the plug-in uses in order to process the Sage CRM database.

2. It ensures that the following Sage CRM tables are exposed to the Web Services so that Paribus is able to perform data merge operations:

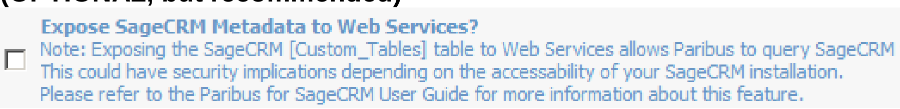
   - Person_Link
   - Comm_Link
   - Address_Link
   - Marketing
   - Library
   - DData
   - Team
   - MultipleEntityLink
   - CaseProgress
   - OpportunityProgress
   - RelatedEntityData

3. **(Optional)**
   If chosen by the user, the component will expose the "Custom_Tables" Sage CRM table to Web Services. This is required if you would like Paribus to automatically establish Paribus Merge Rules for System and Custom entities.

   You can always undo this operation by re-applying the Paribus for Sage CRM support component and choosing not to expose the "Custom_Tables" table to Web Services.

   Note: If this option is skipped; the Paribus for Sage CRM plug-in cannot automatically establish Merge Rules. However, you can use a collection of pre-defined Merge Rules, but these will not reflect any data customisations.

To install the Paribus for Sage CRM Support Component:

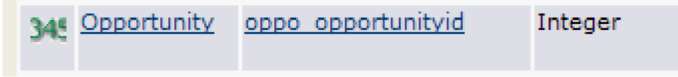
- Log onto Sage CRM as Administrator
- Go to: **Administration** > **Customization** > **Component Manager**
- Click **[Browse…]** and select the file:
  "Application Support\Sage CRM\QGParibusSupport.zip"
  from the Paribus application CD (or downloaded CD image).
- Click **Upload new component**
- You should now see "Paribus for Sage CRM Plugin Support" in the list of Available Components.
- Please select the new Component and click on **Install Component**
- If you are asked to "**Apply all changes?**" choose "**Yes**", if it is not already set.
  - **(OPTIONAL, but recommended)**
    

    This gives you the option of exposing Sage CRM's underlying Metadata to Web Services. Doing so will enable Paribus for Sage CRM to automatically discover related entities (including Custom entities) for Companies and People.
  - NOTE: Skipping this step would require Custom entity relationships be added manually in the plug-in.
- Please click **Install Component** to confirm (optional) parameters and begin the installation.
  - If you are asked to confirm overwrite data from other components, click **[OK]**.
- This will start the Component installation. When the installation is complete, simply click **Continue**.
- You can now exit Sage CRM.

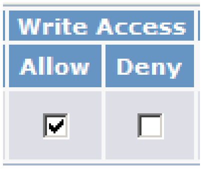
IMPORTANT NOTE:
There is a known issue in Sage CRM prior to v6.1h, which prevents the Opportunities table being updated via Web Services. To resolve this, we would suggest updating Sage CRM to v6.1h (or above). Alternatively, you could perform the following:

Log into Sage CRM:

- Go to: "**Administration** > **Customization** > **Opportunity**"
- Click on the (field security) icon for the "Opportunity" entry:



- Tick the box to Allow Write Access:



- Click **Continue** to save changes.

Setting up Paribus for Sage CRM Plug-in

This section outlines the steps required to set-up and configure your installation of Paribus and the Paribus for Sage CRM Plug-in.

- Step 1: Defining a Paribus Data Provider for Sage CRM
- Step 2: Importing Paribus Definitions for Sage CRM Databases
- Step 3: Testing Your Paribus for Sage CRM Setup
- Step 4: Installing Your Paribus for Sage CRM Licence

Ensure you have successfully completed the steps outlined within this section before attempting to action any of the options available from the Paribus for Sage CRM Plug-in.

Step 1: Importing Paribus Definitions for Sage CRM Databases

The Paribus matching processes are supported by a collection of Paribus Match Definitions, which define what information is to be matched upon and where this information is sourced from (e.g. your Sage CRM database).

The Paribus for Sage CRM solution comes complete with a pre-defined set of Paribus Match Definitions, ready mapped to the standard Sage CRM database model. This includes (primary entities of):

- Company
- Person
- Address
- Telephone Numbers
- Websites and email Addresses

Note: Additional Match Definitions can be manually defined, should an item you require not be provided in the standard set – for details on how to establish your own Match Definitions see the Paribus product on-line help information.

Firstly, start your installation of Paribus from the application icon, and log into the Paribus Control database you created during the installation of Paribus. If you have not yet performed this step, see the *Paribus Getting Started Guide* for more information.

You should be greeted with the Paribus Assistant (Figure 1), offering the ability to Import Paribus Definitions or Define Paribus Definitions manually.

Figure 1 - The Paribus Assistant

Click on the **[Import Definitions]** button. This will open a dialog window asking you to select a Paribus Definition file.

- From the **Select Paribus Definition File** dialog, select the "**Sage CRM (SQL Server).pds**" file. This can found on your Paribus product CD in the **\Application Support** folder or alternatively supplied directly by your Paribus software supplier or Sage CRM Business Partner.
- Once selected, on returning to the **Import Paribus Definitions** screen (Figure 2) the main list should contain the definition items you wish to import.

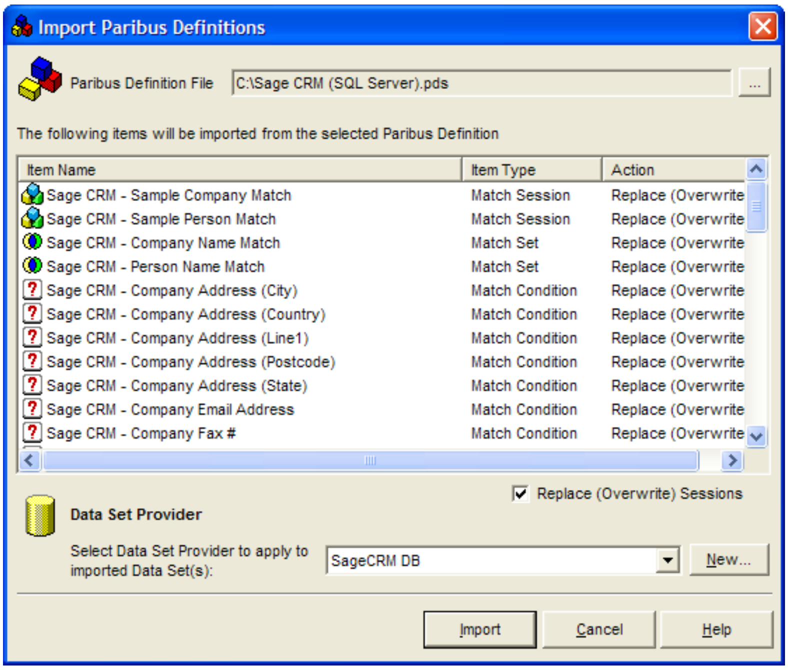


Figure 2 - Import Paribus Definitions Dialog

- The **Action** column denotes which action will be taken during the import. If a definition item already exists, this will be overwritten (if required). If a definition item does not exist, the action will be to add as new.
- The **Replace (Overwrite) Sessions** checkbox denotes if an existing Match Session will be overwritten (if applicable).
- Select the Paribus for Sage CRM Definition file you wish to import by clicking the ellipsis (**…**) button.

  Note: This action happens automatically when first entering this dialog.

Step 2: Defining a Paribus Data Provider for Sage CRM

When importing Paribus definitions that contain Paribus Data Set definitions (Data Maps), it is necessary to denote the Paribus Data Provider definition that will be providing the data to those Data Sets

Important Note: The Sage CRM database defined within your Data Provider must be the primary Sage CRM Database. This ensures the content of the database is complete.

In the **Data Set Provider** section, click the **[New…]** button which will display the **Configure Data Provider** dialog (Figure 3).

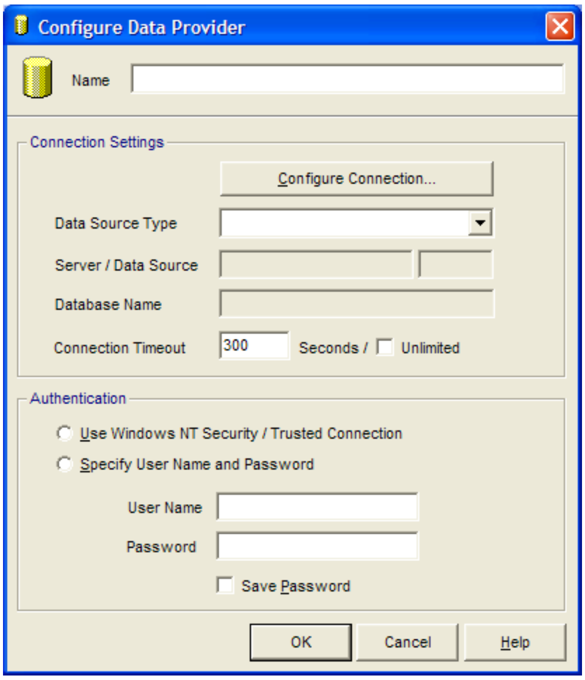


Figure 3 - Configure Data Provider Dialog

This dialog provides the means of defining the connection to your Sage CRM database (which in this example is a Microsoft SQL Server connection).

- Give your Data Provider a meaningful name (we recommend denoting “Sage CRM” in the name is advisable for future reference).
- Click the **[Configure Connection…]** button to begin defining the connection to your Sage CRM database.

From the **Data Link Properties** dialog, Provider tab, select the *Microsoft OLE DB Provider for SQL Server* provider.

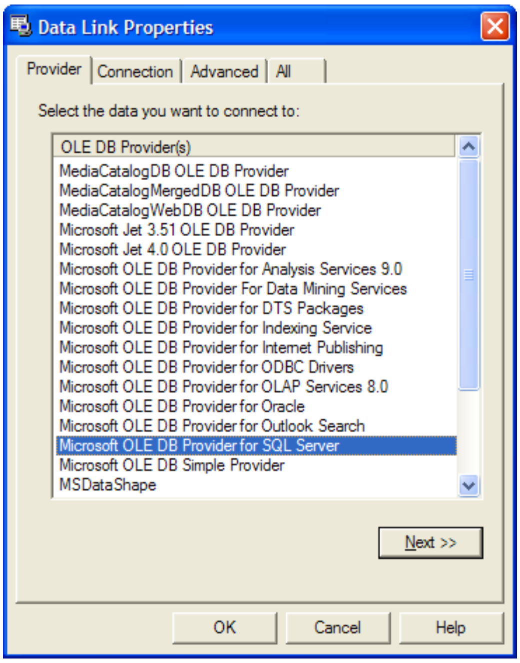


Figure 4 - Data Link Properties Dialog - Provider Tab

Once you have selected the provider, click **[Next >>]**.

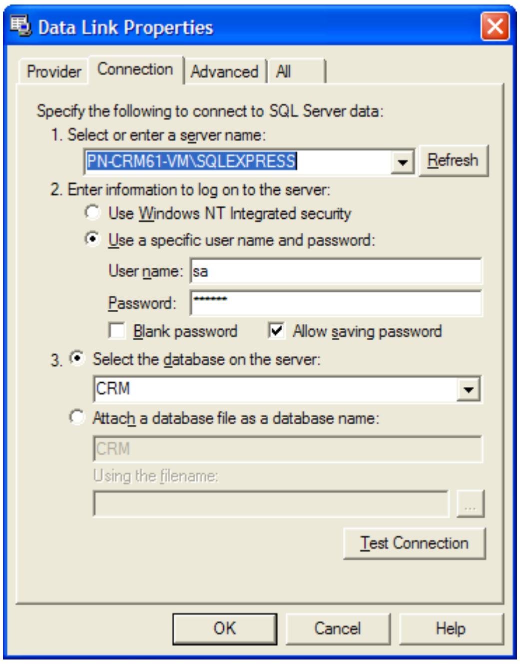


Figure 5 - Data Link Properties Dialog - Connection Tab

From the Connection Tab, complete the following details relating to the SQL Server hosting your Sage CRM database:

Server Name:	This is the name of the SQL Server machine.
Logon Information:	Select the "Use a specific user name and password:" option, and specify the user name and password that owns your Sage CRM database. **Important Note**: This should always be the Sage CRM database administration account (typically "**sa**"), and not a Sage CRM "Admin" account
Allow saving password:	This option ebnables the password to be saved within the Data Provider definition, and prevents a password prompt being displayed any time the password is required. Please note that saved passwords are stored securely under encryption.
Database on the server:	Select your Sage CRM database from the drop-down list.
Test Connection:	Use this button to test your connection details are valid and correct.

If tested successfully, click the **OK** button to return to the **Configure Data Provider** dialog to continue configuring your Data Provider – see page 21.

If your test was not successful, contact your Sage CRM systems administrator or consult your SQL Server documentation.

Configuring Your Paribus Data Provider

Once you have successfully configured the connection details of your Paribus Data Provider, you are now ready to define the additional settings.

Data Provider Connection Settings

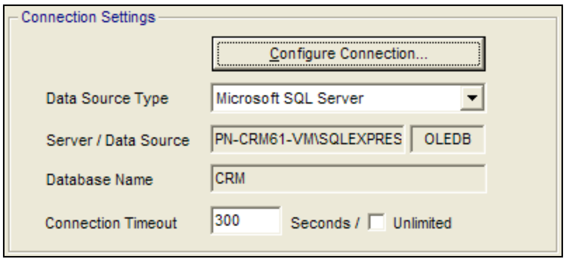


Figure 6 - Connection Settings of Data Provider

This section outlines the (now completed) Connection Settings information that you defined in the previous section. To change these details, click the **[Configure Connection…]** button again.

The **Connection Timeout** value denotes the number of seconds a database transaction has to complete before it is deemed to be not responding. The default value is 300 seconds (5 minutes), however on large databases this value may need to be increased if timeout issues occur.

Data Provider Authentication

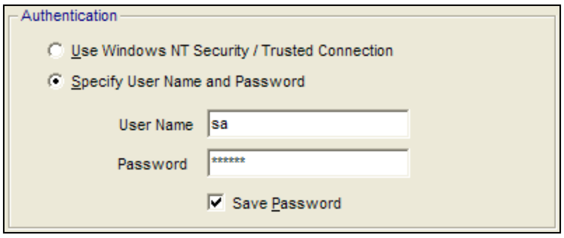


Figure 7 - Authentication Details of Data Provider

The authentication details should also now be completed with the information that you defined in the previous section.

> *Note***:** *For more information on configuring Data Providers, see the Paribus on-line help information.*

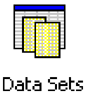
Now that you have configured your Data Provider for the Sage CRM database, click the [OK] button to return to the “Import Paribus Definitions” screen.

Now click the [Import] button to import the Paribus Definitions, which will use your newly-created Data (Set) Provider.

Finally, click **[Close]** to return to Paribus where you should see your imported definitions.

Step 3: Testing Your Paribus for Sage CRM Setup

Once you have successfully imported the Paribus for Sage CRM Match Definitions and defined your Data Provider (Steps 1 and 2), you are now ready to test your set-up to ensure Paribus is correctly configured to access your Sage CRM database.



From the main Paribus application screen, select (left-click) the Data Sets icon in the left-hand navigation bar.

This will display the list of Data Sets. From this list locate the item entitled "**Sage CRM - Company Name**" and Right-click it, and select **Edit Data Set…** from the popup menu.

This action will display the **Data Set Definition** dialog.

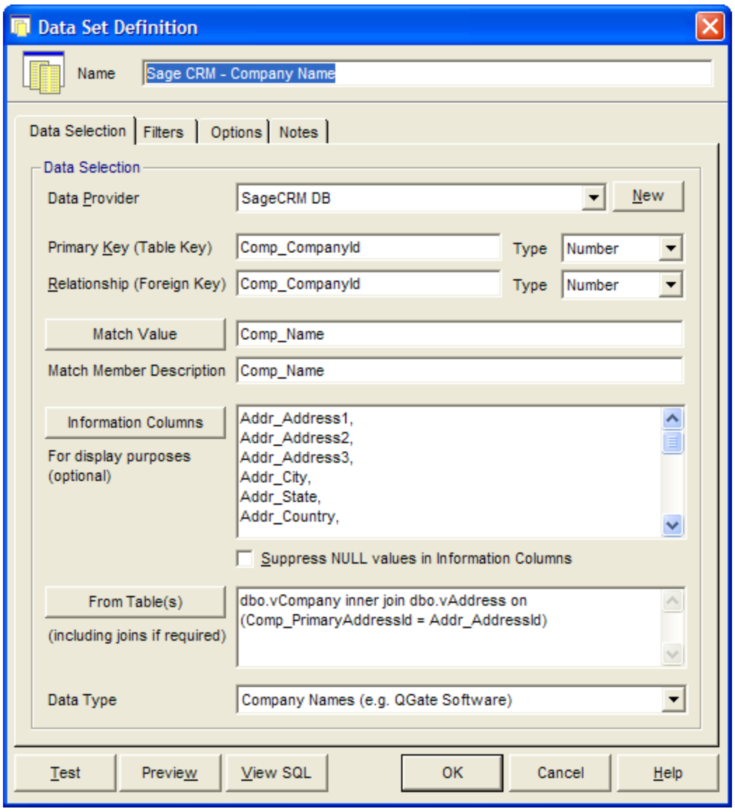


Figure 8 - Data Set Definition Dialog

The **Data Set Definition** dialog details information about database tables and columns that are provided by the Data Provider. Data Sets provide the information used to drive the matching process.

For more information on configuring Data Sets, see the Paribus on-line help information.

Performing the Database Test

To test the Data Set and the Data Provider you created in Step 1, perform the following:

- Ensure the Data Provider is the one you defined in step 1.
- Click the **Test** button to perform a test of the Data Set. This test will not only test the content of the Data Set Definition, but also test the Data Provider definition.
- If the test was successful, the message box similar to the following will appear, detailing the count of records (e.g. Sage CRM Companies) in your Sage CRM database.

- If the test was not successful, the Paribus **Data Set Test Transaction** dialog should appear, providing information on the nature of any failure.

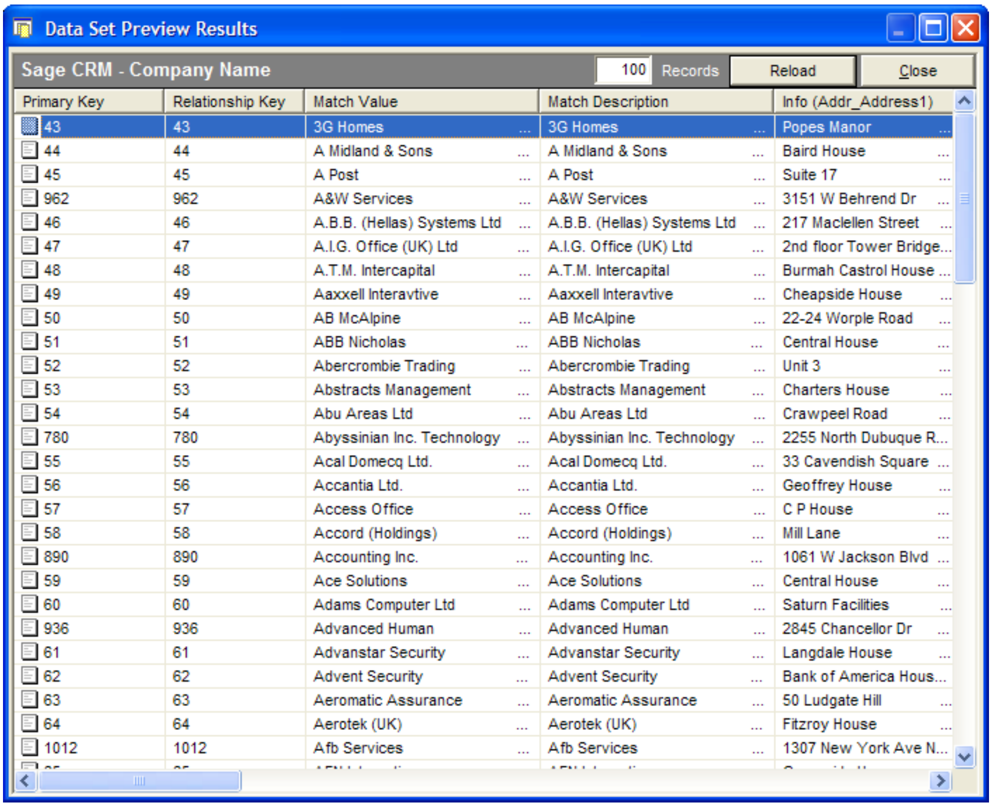
  Check the actions defined in the preceding steps have been defined correctly and retry the test again.

  If the problem persists, please contact your Sage CRM Administrator.
- To close the **Data Set Definition** dialog, click the **Cancel** button.

Previewing Data Set Results

If the Data Set test was successful, you may preview the data provided by the Data Set, by clicking the **[Preview…]** button.

This action will display the **Data Set Preview Results** dialog.



Primary Key	Relationship Key	Match Value	Match Description	Info (Addr_Address1)
43	43	3G Homes	3G Homes	Popes Manor
44	44	A Midland & Sons	A Midland & Sons	Baird House
45	45	A Post	A Post	Suite 17
962	962	A&W Services	A&W Services	3151 W Behrend Dr
46	46	A.B.B. (Hellas) Systems Ltd	A.B.B. (Hellas) Systems Ltd	217 Maclellen Street
47	47	A.I.G. Office (UK) Ltd	A.I.G. Office (UK) Ltd	2nd floor Tower Bridge...
48	48	A.T.M. Intercapital	A.T.M. Intercapital	Burmah Castrol House
49	49	Aaxxell Interavtive	Aaxxell Interavtive	Cheapside House
50	50	AB McAlpine	AB McAlpine	22-24 Worple Road
51	51	ABB Nicholas	ABB Nicholas	Central House
52	52	Abercrombie Trading	Abercrombie Trading	Unit 3
53	53	Abstracts Management	Abstracts Management	Charters House
54	54	Abu Areas Ltd	Abu Areas Ltd	Crawpeel Road
780	780	Abyssinian Inc. Technology	Abyssinian Inc. Technology	2255 North Dubuque R...
55	55	Acal Domecq Ltd.	Acal Domecq Ltd.	33 Cavendish Square
56	56	Accantia Ltd.	Accantia Ltd.	Geoffrey House
57	57	Access Office	Access Office	C P House
58	58	Accord (Holdings)	Accord (Holdings)	Mill Lane
890	890	Accounting Inc.	Accounting Inc.	1061 W Jackson Blvd
59	59	Ace Solutions	Ace Solutions	Central House
60	60	Adams Computer Ltd	Adams Computer Ltd	Saturn Facilities
936	936	Advanced Human	Advanced Human	2845 Chancellor Dr
61	61	Advanstar Security	Advanstar Security	Langdale House
62	62	Advent Security	Advent Security	Bank of America Hous...
63	63	Aeromatic Assurance	Aeromatic Assurance	50 Ludgate Hill
64	64	Aerotek (UK)	Aerotek (UK)	Fitzroy House
1012	1012	Afb Services	Afb Services	1307 New York Ave N...

Figure 9 - Data Set Preview Results Dialog

The Data Set Preview Results dialog displays a list of records (100 by default) established from the Data Set definition, this includes:

- **Primary Key**: The Primary Key value of the Data Set
- **Relationship Key**: The Relationship key value of the Data Set
- **Match Value**: The value(s) that will be used to match data from this Data Set
- **Match Description**: The description is the value that will appear in the Match Review process
- **Info Columns**: Additional columns of data used to provide information only data

To see more records, change the value in the Records field and click the Reload button.

Step 4: Installing Your Paribus for Sage CRM Licence

Using the Paribus for Sage CRM Plug-in requires a Plug-in licence to be installed.

Licences are issued at the time of purchase and can be obtained from your Paribus Software Supplier or Sage CRM Business Partner.

Running with a Paribus Evaluation Licence

If your installation of the main Paribus product is running on an evaluation licence, and/or you do not have a licence for the Paribus for Sage CRM Component, the Paribus for Sage CRM Component will only provide limited functionality.

Paribus Licence Manager

The Paribus Licence Manager (Figure 10) is used to add, edit, and delete licences and can be accessed via the Paribus main menu: **File** > **Licence Manager...**

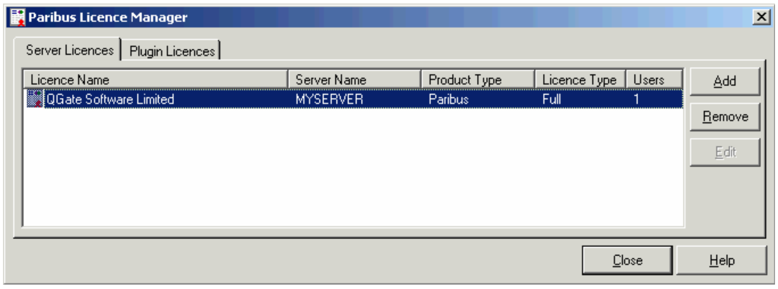


Figure 10 - Paribus Licence Manager

Adding Your Paribus for Sage CRM Component Licence

- To add your Paribus for Sage CRM licence, open the **Paribus Licence Manager** and select the **Plug-in Licences** tab.
- New licences are added by clicking the **Add** button. A standard file selection dialog is displayed from where the required Paribus Plug-in Licence (***.ppl**) can be selected.
- Select the licence file: **Paribus for Sage CRM.ppl**
- Having successfully added your Paribus Plug-in licence, this will then be listed in the Licence Manager list.

Identifying Matching Data in Sage CRM

Once you have successfully set-up the Paribus for Sage CRM Plug-in, you are now ready to begin identifying matching (duplicate) Sage CRM Companies and/or People.

If you have yet to complete the set-up process outlined on Page 15, we strongly recommend you do so before continuing with this section.

Establishing the Matching Process

Firstly, it is important to establish the most effective matching process when wishing to identify duplicate records within your Sage CRM database.

Considering the data structure of CRM Companies and Persons are all separate but related, it is necessary for each of these entities to be processed individually.

Match Process 1: Sage CRM Company

The first match process should be to match Sage CRM Company, to establish a collection of potential duplicate Companies for consolidation (reassignment of related records) and de-duplication.

In turn, this will consolidate associated Person from all duplicate Companies, into a single ‘Master’ Company.

There is the potential that the consolidated Person are also duplicates within the same Company. This issue will be handled in the next match process.

Match Process 2: Sage CRM Person

Once the first match process of Sage CRM Companies has been identified and the results processed against your Sage CRM database (consolidation and duplicate removal), you are then able to execute the second match process against Sage CRM Person.

Warning! – We do not recommend running the second match process until you have successfully completed the first match process.

The criteria for this match process should ideally be based upon similar sounding Person names (title, first and last), and an exact match on Sage CRM Company ID.

This will ensure that only Person at the same Company are deemed potential duplicates. This is an important consideration when dealing with person names; as many people can share the same name, but are however technically not the same person (i.e. Mr John Smith). Adding the Company relationship into the matching criteria can help to reduce the occurrence of this.

Paribus for Sage CRM Match Definitions

The Paribus for Sage CRM Match Definitions set you imported during the set-up (see page **Error! Bookmark not defined.**), provides two example Match Paribus Sessions:

- One matching on Sage CRM Company (Match Process 1)
- One matching on Sage CRM Person (Match Process 2).

Running a Paribus Match Session

Let's begin by running the first of our Paribus Match Session to identify Sage CRM Company matches. To achieve this we will use the sample Match Sessions supplied in the Match Definitions we imported earlier.

Match Sessions

From the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the item entitled "**Sage CRM - Sample Company Match**" and Right-click it, and select **Run Session…** from the popup menu.

This action will display the **Identify Matches** dialog.

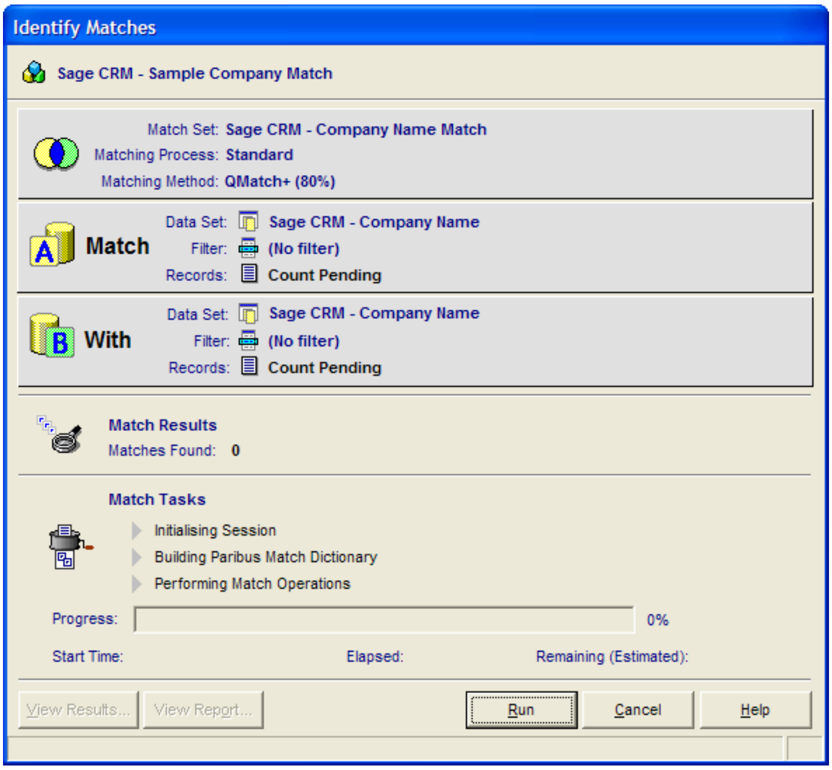


Figure 11 - Identify Matches Dialog

This dialog provides the means of running an existing Match Session, to identify matching data.

The summary information shows details about the Match Session, together with information on the progress of the matching process.

To start the matching process, click the **[Run]** button.

You will be prompted with the option to run the Match Session immediately or later as a scheduled task. Select "**Run Match Session Immediately**" and click **[OK]**.

Providing everything has been set-up and configuration correctly, the matching process should begin processing your Sage CRM data to identify duplicates.

If any errors are reported, check the set-up and configuration of your Paribus installation and retry this operation.

Note: If the count of records to be processed is sizeable (> 20,000 Companies), this process may take some time to complete. If you wish to cancel the matching process and refine the criteria, then click the **[Cancel]** button and go to the section "Defining/Refining the Match Session Settings" on Page 29.

Once the Identifying Matches process has completed, a summary report detailing the findings of the process is displayed. Closing the report window will return you to the Identify Matches dialog.

If Paribus successfully identified matching records, you may now review the Match Results (see Page 34).

If Paribus was unable to identify any matches, this may be due to one or more of the following:

- No duplicate information exists within your Sage CRM database.
- The match criteria defined within the Match Session is set too high – see "Defining/Refining the Match Session Settings" on Page 29.

To close the **Identify Matches** dialog, click the **[Close]** button.

Defining/Refining the Match Session Settings

The matching process is defined within your Paribus Match Session. You may wish to define or refine your Match Session several times to achieve the best results.

From the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the item entitled "**Sage CRM - Sample Company Match**", Right-click it, and select **Edit Session…** from the popup menu.

This action will display the **Match Session Settings** dialog.

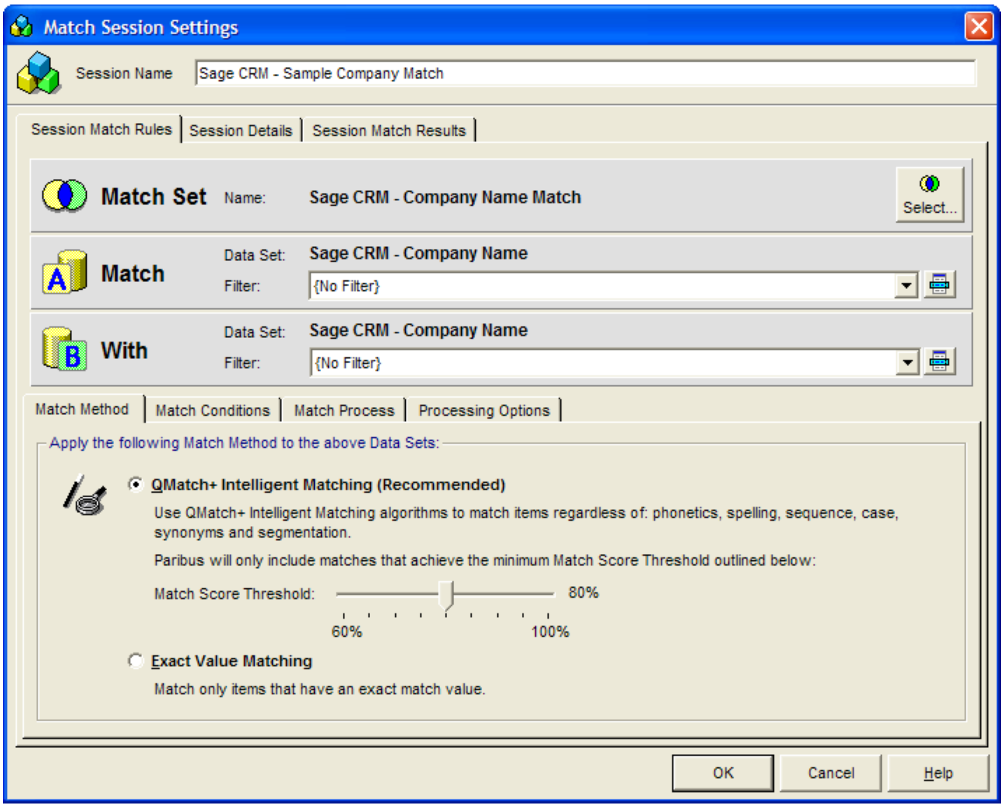


Figure 12 - Match Session Settings Dialog

This dialog outlines the configuration of an existing Match Session, defined to match upon Sage CRM Company names.

Session Match Rules Tab

The Session Match Rules tab denotes the Match Set that will be used to initially identify Sage CRM Company and Person records (i.e. **Sage CRM - Sample Company Match**). This Match Set defines two Data Sets that are compared in the matching process.

Data Sets

The two Data Sets (A and B) defined by the Match Set, combine the same Data Sets (i.e. **Sage CRM - Company Name**), to provide the ability of performing a self-match upon the same set of data.

Filters

Each Data Set (A and B) can have an optional filter applied to them, which denotes the content of each Data Set. A filter may be based upon location (e.g. UK Companies), or perhaps Account Manager. Filters provide a useful means of limited the scope of the matching process (where appropriate).

Filters can be managed by clicking the filter icon button ().

Caution! – When applying a filter, avoid using filters that may limit the scope of a Data Set with criteria that may conflict with what you are trying to match. An example of a conflicting filter would be to filter Company names, as this would potentially limit the ability to match Companies of differing names but still potentially duplicates (e.g. *University of London* would not find *London University*).

Match Method

The Match Method Tab denotes the method to use when matching your Sage CRM Company and Person names.

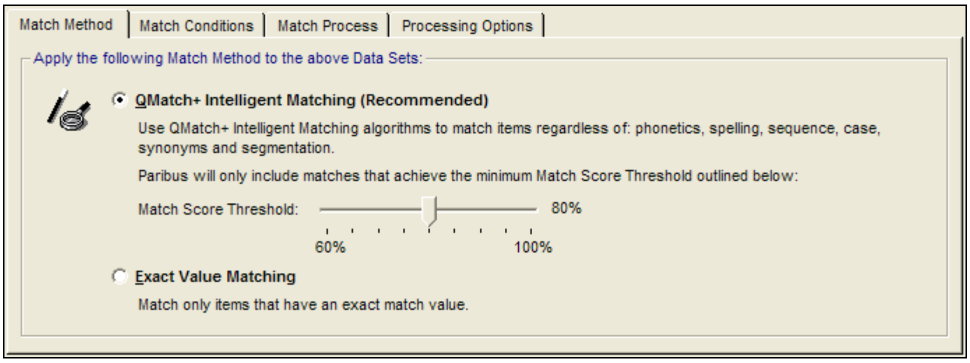


Figure 13 – Match Session - Match Method Tab

QMatch+ Intelligent Matching

By default matching Sage CRM Companies/People should use the **QMatch+ Intelligent Matching** method, which identifies matching Company/Person names regardless of phonetics, spelling, sequence, case, synonyms and segmentation.

Match Score Threshold

The **Match Score Threshold** denotes the minimum match score a Company/Person must achieve to be classed as a duplicate. Low match score values will provide relaxed matching, whilst high match score values enforces stricter matching.

A default match score of **80%** typically provides suitable results for most Sage CRM Company and Person names.

For more information on QMatch+ Intelligent matching, see the Paribus online information.

Exact Value Matching performs matches upon a direct comparison (with the exception of case). This does not typically provide a suitable matching method for Sage CRM Company/Person names.

Match Conditions

The Match Conditions Tab denotes what additional conditions (match criteria) should be applied when matching your Sage CRM Company and Person names.

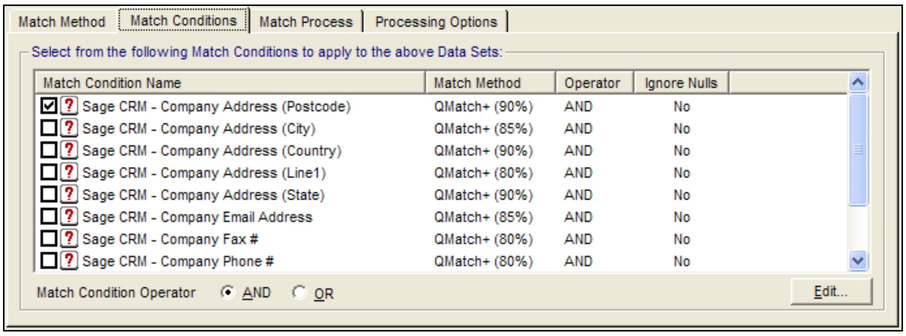


Figure 14 - Match Session - Match Conditions Tab

In the case of matching Sage CRM Company names, a Match Condition of **Postcode** or **Address (Line1)** typically provides an effective condition to the matching process. Other Match Conditions can also be added if required.

In the case of matching Sage CRM Person names, a Match Condition of **Company ID** typically provides an effective condition to the matching process. Other Match Conditions can also be added if required.

- To select a Match Condition, check the box to the left of the Match Condition.
- The behaviour of each Match Condition can be changed by double-clicking the Match Condition item. This action will display the **Session Match Set Condition Settings** dialog for the select Match Condition.

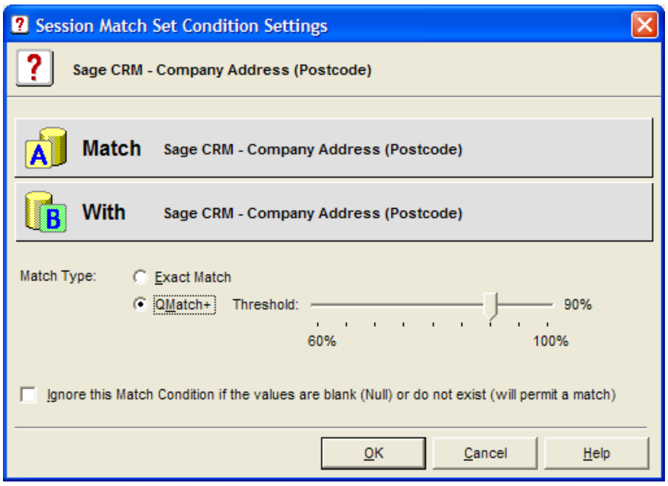


Figure 15 - Session Match Set Condition Settings Dialog

- **Match Type**: Denotes the match type operation for this Match Condition.
- **Threshold**: Denotes the match score threshold this Match Condition must reach for this Condition to be met.
- **Ignore Nulls**: If checked this option denotes that if a Match Conditions value is NULL (blank) that it will still pass the conditional check. Use this option if your data is not always complete and you wish to include items that may otherwise not fulfil the criteria.

Matching Process

The Matching Process Tab denotes which Paribus Match Process should be used when matching your Sage CRM Company and Person names.

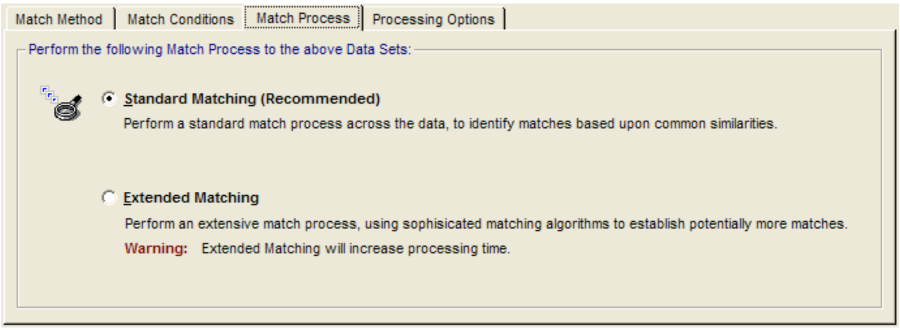


Figure 16 - Match Session - Matching Process Tab

By default, data matching with Sage CRM should use the **Standard Matching** process. The **Extended Matching** process performs a much more granular comparison of the data, however this does dramatically increase the processing time required. Generally for matching on Sage CRM Company and People names, extended matching is not recommended.

Processing Options

The Process Options Tab denotes processing options available when performing the Matching Process.

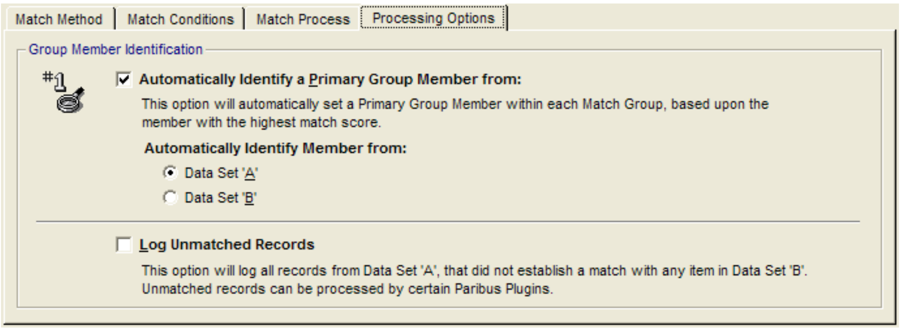


Figure 17 - Match Session - Processing Options Tab

Automatically Identify a Primary Group Member

This option denotes that a Primary Group Member (Master Company or Person) will be automatically identified within each group of matches found. The member selected is based upon the one with the highest match score, from the specified Data Set.

We recommend using this option when matching Sage CRM Companies and People, as this will greatly assist in the Match Review process.

Automatically Identify Member from

This option denotes the Data Set from which to automatically select the Primary Group Member (master entity).

For more information on configuring Paribus Match Session Settings, see the Paribus online information.

Reviewing your Sage CRM Paribus Match Results

Having successfully established a set of Paribus Match Results, the next stage is to review them. The Paribus review process is indented to provide an illustration of the duplicate Sage CRM Company and/or Person records found, and the opportunity for the user to alter any duplicate relationships if required.

Important Warning

No Sage CRM Company and/or Person records can be processed (removal of duplicate data) by the Paribus for Sage CRM Plug-in until they have been reviewed. This is to ensure that no data can be changed or removed without prior confirmation.

The Paribus Review Window

The Paribus Review Process is managed from the Paribus Review Window, available from within the main Paribus application.

Paribus Match Results are contained within the Match Session responsible for generating them.

To review Match Results for a given Match Session, from the main Paribus application screen, select (left-click) the Match Sessions icon in the left-hand navigation bar.

This will display the list of existing Match Sessions. From this list locate the Match Session you wish to review, Right-click it, and select **Review Session…** from the popup menu.

Note: This option is not available if your session does not contain any results.

This action will display the - Session Match Results - Review Window (Figure 18).

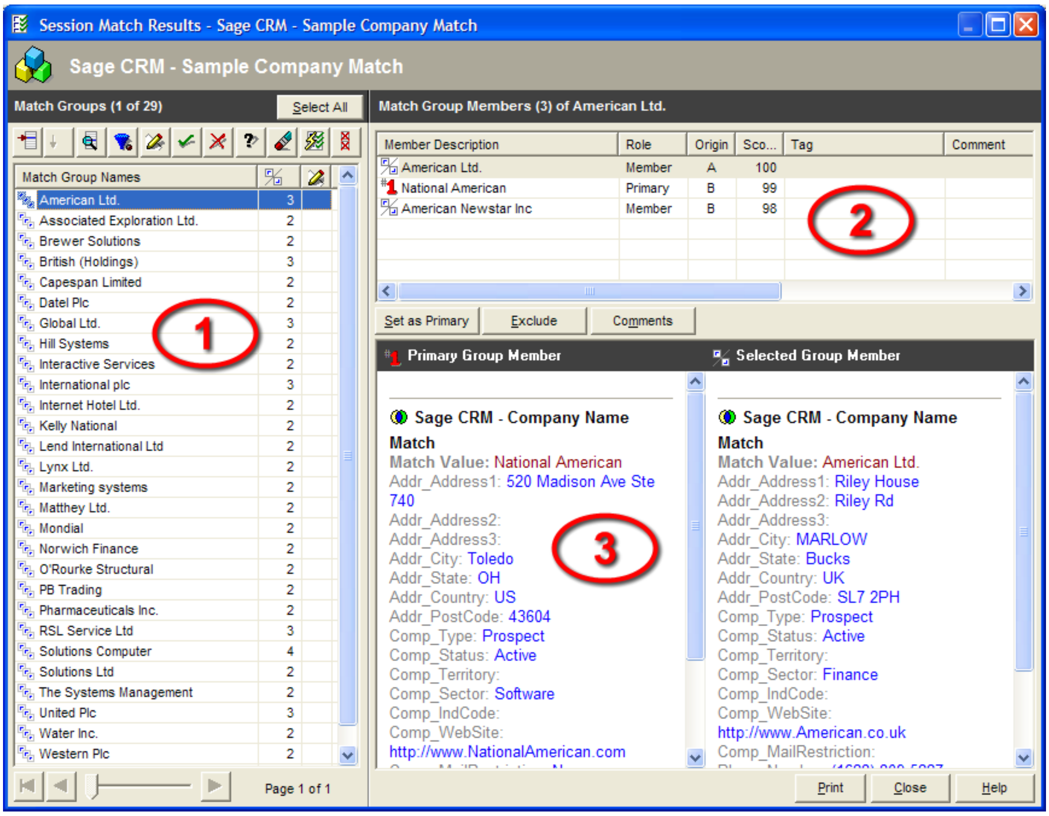


Figure 18 - Session Match Results - Review Window

The Session Match Results window provides the means of reviewing the matches found within your Paribus Match Session. This window illustrates the following:

Match Groups (1)	All duplicates are grouped into Match Groups, and are listed in the Match Group list on the left of the review window. Below the Match Group list is a collection of navigation controls, which enable you to navigate through additional pages of Match Groups. Match Groups are displayed in pages of 50.
Review Control Buttons (2)	The collection of buttons at the base of the review window provides control of the Paribus **Match Groups** and **Group Members**.
Member Information Pane (3)	The bottom-right area provides a summary of additional information about each Group Member. This information is provided to assist the review process of confirming duplicates.

For more information on the Paribus Match Review window, see the Paribus online information.

Review Process Objectives

The main objective of the Paribus Review Process is to manually review each of the Match Groups, and confirm acceptance or rejection of the duplicates that Paribus has identified.

The Paribus technology is designed to identify matching data based upon the matching rules you define, however sometime the match results may not always be as desired. This may be due to one or more of the following:

- Poor data
- Inappropriate matching rules
- Too relaxed or too strict match score thresholds.

In the case of reviewing Sage CRM match results (i.e. Company and People), the status of each Match Group must be set explicitly to denote your acceptance or rejection of that Match Group.

Furthermore, the Role of each Group Member must also be set to denote what record will act as the Primary (master record), and which members are simply members (duplicates). In addition, single Group Members can also be excluded.

The Match Group status is used during the duplicate processing performed by the Paribus for Sage CRM Plug-in to control which Match Groups will be updated.

Furthermore, the Group Member Role is also used by the Paribus for Sage CRM Plug-in to denote which records are processed and how.

Match Group Statuses for Sage CRM Results

For the purposes of processing duplicates by the Paribus for Sage CRM plug-in, the following Match Group statuses apply:

Not Reviewed (System Default)	This is the default Match Group status applied by Paribus at the time of matching. The Paribus for Sage CRM plug-in will not process any groups of this status.
Reviewed	Setting a Match Group status to “Reviewed” denotes your acceptance of this Match Group and that the group contains valid duplicate members and the Primary member (master) will be the one remaining Company or Person after the processing of duplicates. **Note**: A Match Group status cannot be set to “Reviewed” unless a Primary Group Member has been defined (see below), or contains less than two active members.
Void	Setting a Match Group status to “Void” denotes your rejection of this Match Group and that you wish this group to be excluded in the processing of duplicates.

Query	Setting a Match Group status to “Query” denotes you have a query against this Match Group and wish to return to this at a later stage. Queried Match Groups will <u>not</u> be included in the processing of duplicates. Setting Match Groups statuses to “Query” provides the means of marking them during the review process and moving on, with the ability to return to them later or after seeking assistance from someone else if required.

Group Member Roles for Sage CRM Results

For the purposes of processing duplicates by the Paribus for Sage CRM plug-in, the following Group Member Roles apply:

Note: The Member Roles listed here are for Single Data Source matches only.

Primary Member (Master Record)	Setting a Group Member Role to “Primary” denotes the member is an active member of the group and is classed as the **Master** record. The Primary Member (Master) when processed by the Paribus for Sage CRM Plug-in is the record that will remain and inherit all associated information from the duplicates (options dependent).
Member (Default) (Duplicate Record)	Setting a Group Member Role to “Member” denotes the member is an active member of the group and is classed as a **Duplicate** record. Members (Duplicates) when processed by the Paribus for Sage CRM Plug-in are the records that will be removed (options dependent).
Excluded Member	Setting a Group Member Role to “Excluded” denotes the member has been excluded from the Match Group, and will not be processed by the Paribus for Sage CRM Plug-in. (This record will not be affected). **Note**: When excluding members from a Match Group, if the Match Group has less than two active members, the Match Group status will automatically be changed to “Void” ( ).

For more information on Match Groups and Group Members, see the Paribus online information.

Assisting the Review Process (Duplicate Summary Information)

To assist you in the review process of manipulating Match Groups and Group Members, additional summary information is provided in the summary area below the Group Member list.

The content of the summary is defined within the **Information Columns** definition of the following Paribus Data Sets:

- Sage CRM - Company Name
- Sage CRM - Person Name

For more information on editing Data Sets, see the Paribus online information.

Recording Notes and Comments

Whilst reviewing your Sage CRM Companies and People, you may wish to make notes and comments against either the Match Group of individual Group Members. This can be done from within the Paribus Review window.

Making notes is an ideal way of recording observations or comments against the matches as you review them, which can then be viewed again later.

Match Group Notes

If you wish to add a note against a Match Group, select the Match Group and click this button.

Member Tags and Comments

If you wish to add a Tag or comment against a Group Member, select the Member and click this button.

The Tag provides the means of attributing a fixed item of data (e.g. Marketing-code, Campaign-code) to a Group Member.
Note: The Tag will be recorded against the Company's or Person's Paribus Audit record, during the processing of duplicates.

Part Review/Part Process Duplicates

Paribus and the Paribus for Sage CRM Plug-in enable you to part-review a set of Match Results, and process only those that have been reviewed (i.e. Match Groups with a Group Status of "Reviewed" ()).

This approach avoids any lengthy delay between reviewing all Matches Results before they can be processed.

This approach can also assist in managing the volume of change that is applied to your Sage CRM database. You may wish to manage and process batches of duplicates to reduce the amount of system change that occurs.

There is no issue in processing your Paribus Match Session results through the duplicate removal processes more than once, as the process will only affect data that was not already been processed, or has subsequently changed.

Processing Duplicate Records in Sage CRM

This section outlines the steps required to process the Sage CRM records based on the results from a Match Session, which have been identified in the previous sections.

If you have not yet created, run and reviewed a Match Session against Sage CRM; please see the previous sections in this guide for further information.

The Paribus for Sage CRM Plug-in

Processing of duplicate Sage CRM Companies and Persons is achieved using the Paribus for Sage CRM Plug-in.

The plug-in has been specifically designed to integrate with Sage CRM databases, and utilises the Web Services interface to connect and perform the processing of duplicate data within your Sage CRM database.

By utilising the Sage CRM Web Services interface; the plug-in ensures that all Sage CRM security and data privilege requirements are fully adhered to.

The Paribus for Sage CRM plug-in is available directly from within the main Paribus application.

You can launch the Paribus for Sage CRM plug-in by:

- Choosing: **Tools** > **Plugins** > **Paribus for Sage CRM** from the main menu in Paribus (Figure 19).

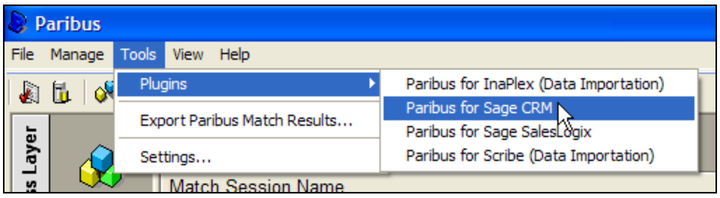


Figure 19 - Opening the Paribus for Sage CRM plug-in

Sage CRM – Plug-in Logon

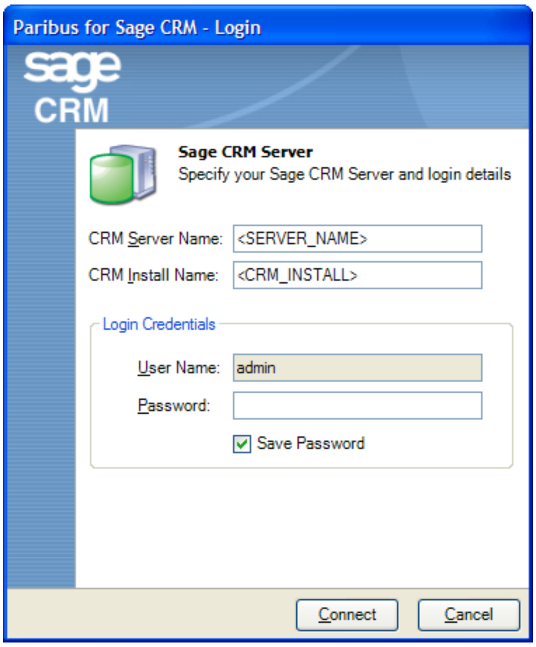


Figure 20 - Logging into Sage CRM

Upon opening the plug-in, you will be asked for the following login criteria (Figure 20) to allow the plug-in access to Sage CRM.

As mentioned previously, this needs to be the “admin” Sage CRM user account.

Enter the required information and then click **[Connect]**.

Important Database Logon Considerations

When logging on to your Sage CRM database from the Paribus for Sage CRM plug-in, please acknowledge the following important considerations:

User Access Rights

Ensure that the user account you are using to log Paribus into Sage CRM has:

- Permission to access Sage CRM via Web Services
- The appropriate user access rights to access all the data that Paribus needs to process.

If the user account does not have sufficient access to all the Company and/or Person records being processed (e.g. merge), then the Paribus plug-in operations will fail.

Sage CRM Server

Ensure that the database you are logging into is the same Sage CRM server/database that was used to generate the matches in your Paribus Match Session.

Note: Paribus is unable able to check this.

Paribus for Sage CRM – Main Menu

Upon logging into Sage CRM with the Paribus plug-in, you will be taken to the main menu screen (Figure 21).

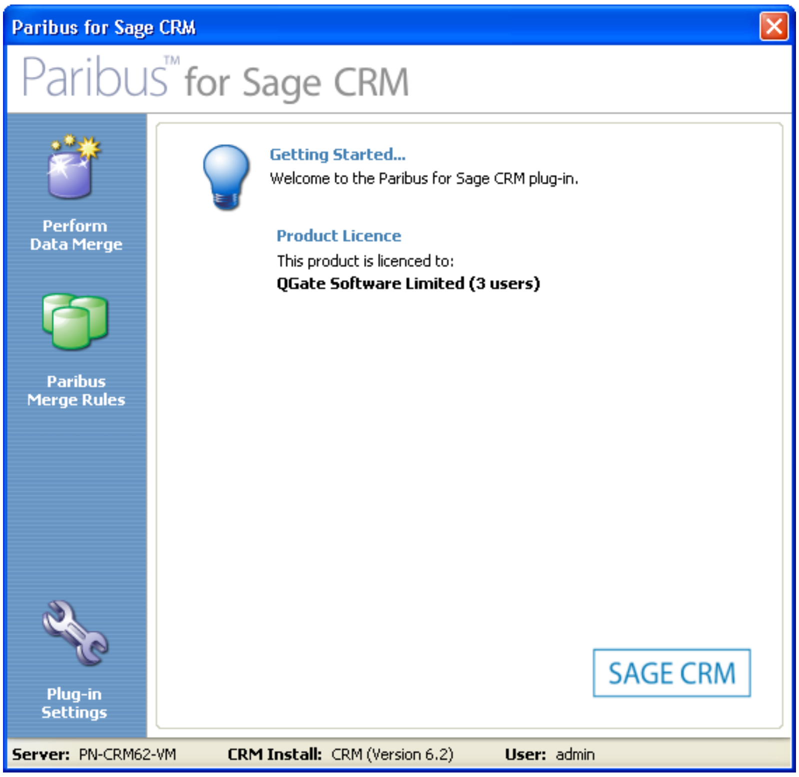


Figure 21 - Paribus for Sage CRM: Main Menu Screen

The main menu screen for the Paribus for Sage CRM plug-in provides access to the various features that are available.

The main screen is divided into two primary sections, a navigation bar to the left of the screen and a detail section to the right relating to the currently selected operation.

The navigation bar allows you to do the following:

- Perform a Data Merge (see Page 42, Paribus for Sage CRM – Data Merge Wizard)
- Manage Merge Rules (see Page 53, Merge Rule Management)
- Plug-in Settings (see Page 60)

Paribus for Sage CRM – Data Merge Wizard

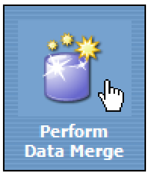
This section will guide you through the process of performing a data merge operation on your Sage CRM using the Data Merge Wizard.

The steps involved are as follows:

- Step 1: Select a Paribus Match Session (Page 44)
- Step 2: Post merge (Page 47)
- Step 3: Merge Associated Records (Page 48)
- Step 4: Confirm Data Merge Process (Page 49)
- Step 5: Database Update Warning (Page 50)
- Step 6: Perform Data Merge (Page 51)
- Step 7: Data Merge Summary (Page 52)

Note: The first time you run Paribus for Sage CRM, you will need to define the Paribus Merge Rules. For more information, please see the section on “Merge Rule Management” (Page 53).

Running the Data Merge Wizard



To start the process of merging Sage CRM Companies or People, simply click on the **Perform Data Merge** icon (see opposite) from the Main Menu screen.

This will display a choice of Entity types to merge in the right-hand pane (Figure 22).

Figure 22 - Choose Cleansing Type

Select the entity type you wish to perform a Merge operation against. Once you have selected an entity type, click **[Start Merge Wizard…]** to open the Merge Wizard for your chosen entity type.

> *Note: For the purposes of demonstration, this guide shows screenshots from the steps taken to perform a "Company" merge operation. However, other entity merge operations are very similar.*

From the wizard welcome screen, click **[Next >]** to proceed to the Paribus Match Session Selection screen.

Step 1: Select a Paribus Match Session

You need to tell the Data Merge Wizard which Paribus Match Session you wish to use for this merge operation. To do this, click on the **[Select Session…]** button.

This will open the Paribus Match Session Selection window (Figure 23), displaying all available Reviewed (Single Data Source) Match Sessions.

> *Note: You can only perform Data Merge operations on Match Sessions that use a Single Data Source.*

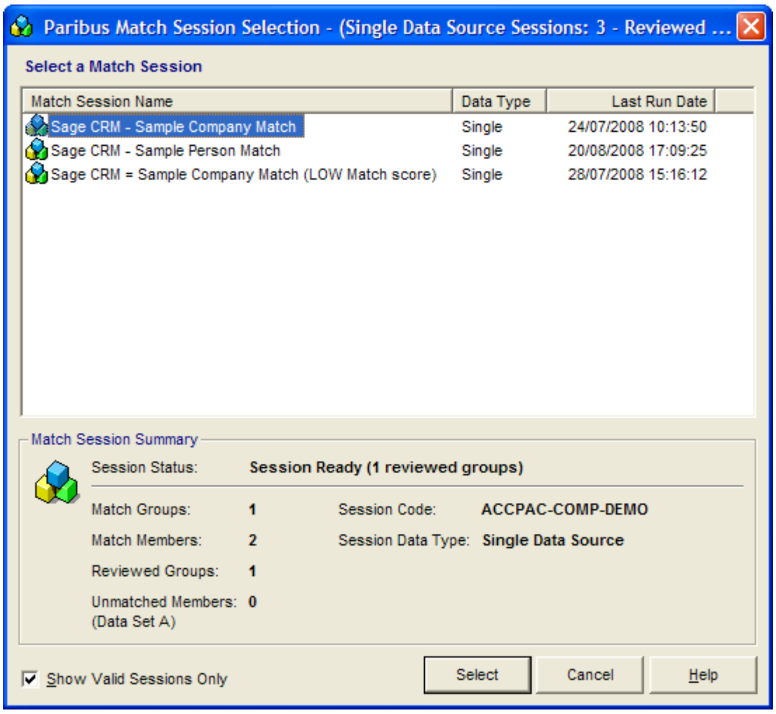


Figure 23 - Paribus Match Session Selection

Once you have chosen your Match Session, click **[Select]** to return to the Data Merge Wizard. You should now see the details of your chosen Match Session (Figure 24).

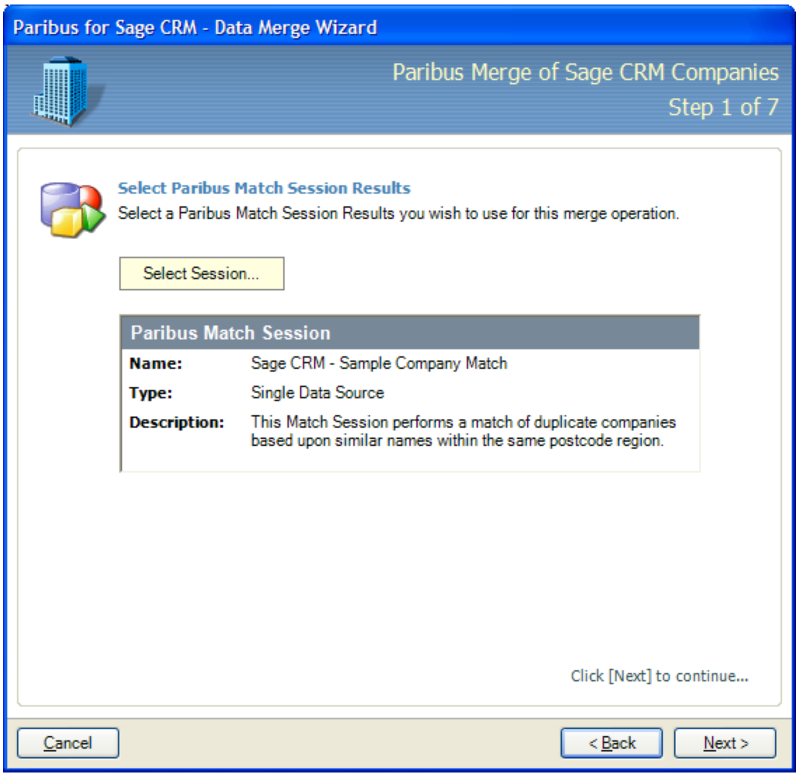


Figure 24 - Match Session Selected

At this point, if you have chosen the wrong Match Session; you can pick a different Match Session by clicking **[Select Session…]** again.

Otherwise, click **[Next >]** to continue.

The Data Merge Wizard will now perform a validation check to make sure that the Paribus Match Session that you have just selected is valid.

Validating your Selected Paribus Match Session

This step attempts to ensure that the CRM entities within the chosen Match Session match the data in the connected CRM database.

If validation was successful, you will be automatically taken to the next step.

If the Data Merge Wizard determines that you have selected the wrong Session for the chosen Entity type/, then the following additional step of the Merge Wizard will appear (Figure 25).

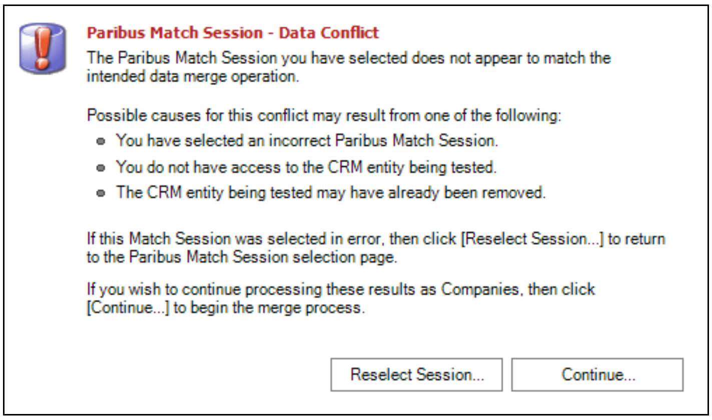


Figure 25 - Data Conflict Warning

At this point, you have the option to either: choose another Match Session, or proceed anyway (ignoring the warning).

The validation process performed is based upon an attempt to access & compare the first three items in the Paribus Match Results against the current Sage CRM connection.

If you choose the option to **[Reselect Session]**, this action will return you to "Step 1: Select a Paribus Match Session" (see Page 44).

If you choose the option to **[Continue]**, this action will progress you to the next step.

Step 2: Post merge operation(s)

Important Note:
Once each Duplicate Company/Person has had been merged with the Master entity (based on the Paribus Merge Rules); Paribus will delete the duplicate record permanently from Sage CRM (along with any related records that were not part of the merge process).

Step 3: Merge Associated Records

Companies and People in Sage CRM are comprised of many additional records. For example: Addresses, Phone Numbers, Notes, etc. When performing a merge operation on a duplicate Company/Person, all these related entities need to be taken into consideration.

The Data Merge Wizard achieves this with the use of Merge Rules (Figure 26). Merge Rules enable you to specify the associated records that should also be merged into the master record. At this point it will list the Merge Rules that are currently enabled.

To change the Merge Rules that should apply to your merge operation; click **[Manage Merge Rules…]** to open the Merge Rule Management screen. For more information, please see the section on "Merge Rule Management" (Page 53).

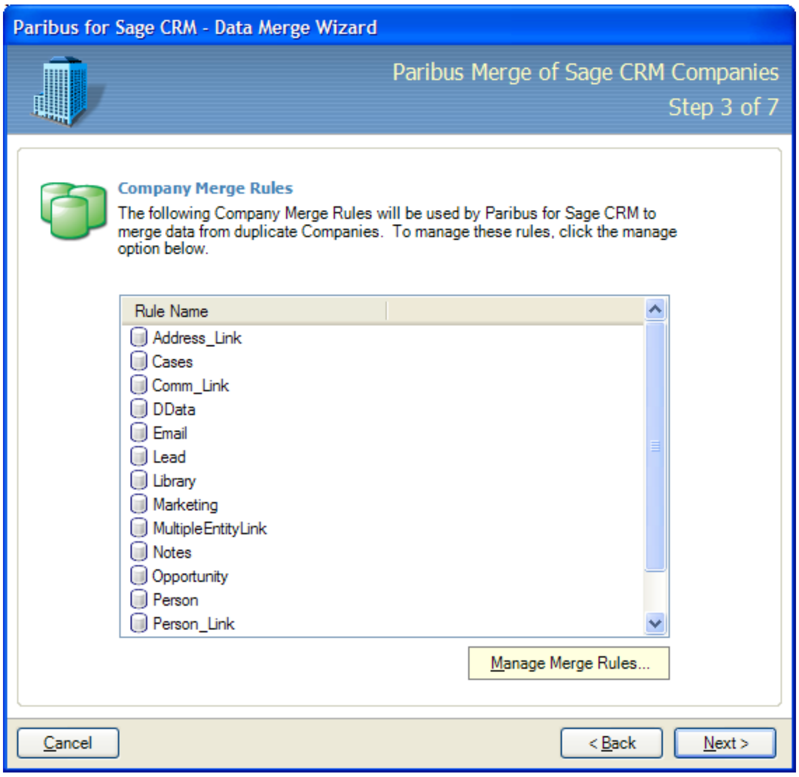


Figure 26 - Entity Merge Rules

Once you are happy with the Merge Rules that will be used for the current merge operation, click **[Next >]** to continue.

Step 4: Confirm Data Merge Process

In order to double-check the options you have chosen for the current Data Merge Process; this screen provides a quick summary (Figure 27).

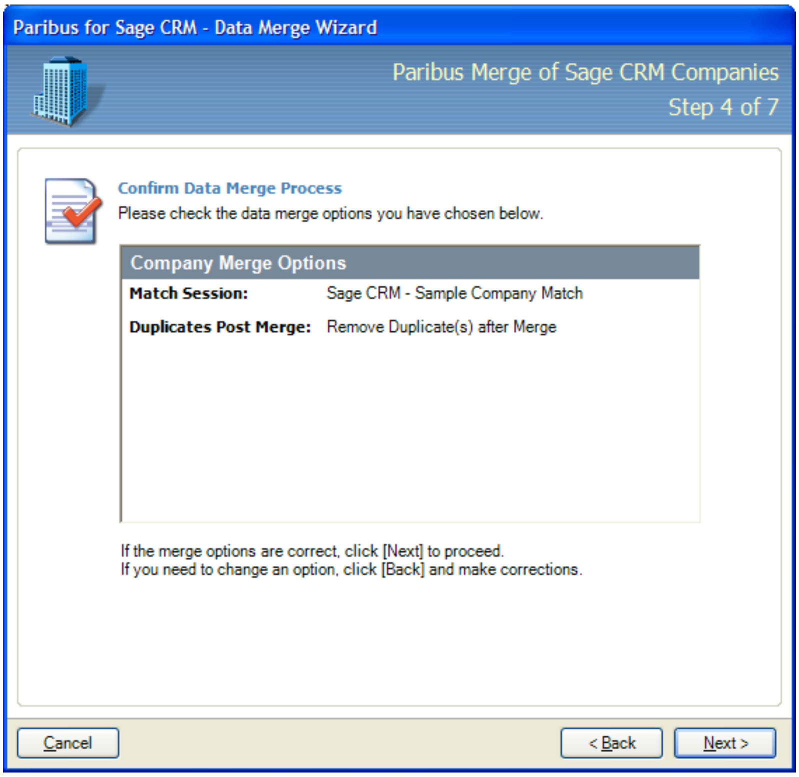


Figure 27 - Confirm Data Merge Process

At this point you can either click **[< Back]** go back and change options as necessary, or continue forward by clicking **[Next >]**.

Step 5: Database Update Warning

Until this point the whole Paribus data matching process has only accessed the data within your Sage CRM database in a read-only manner and has not performed any update to the data it has accessed.

Due to the very nature of the Paribus data merge process, the data within you CRM database will now be affected by the outcome of this task.

To ensure that you are fully aware of the implication of this, together with advice and guidance upon how best to safe-guard against accidental data lost, the Merge Wizard presents the following data update warning page (Figure 28).

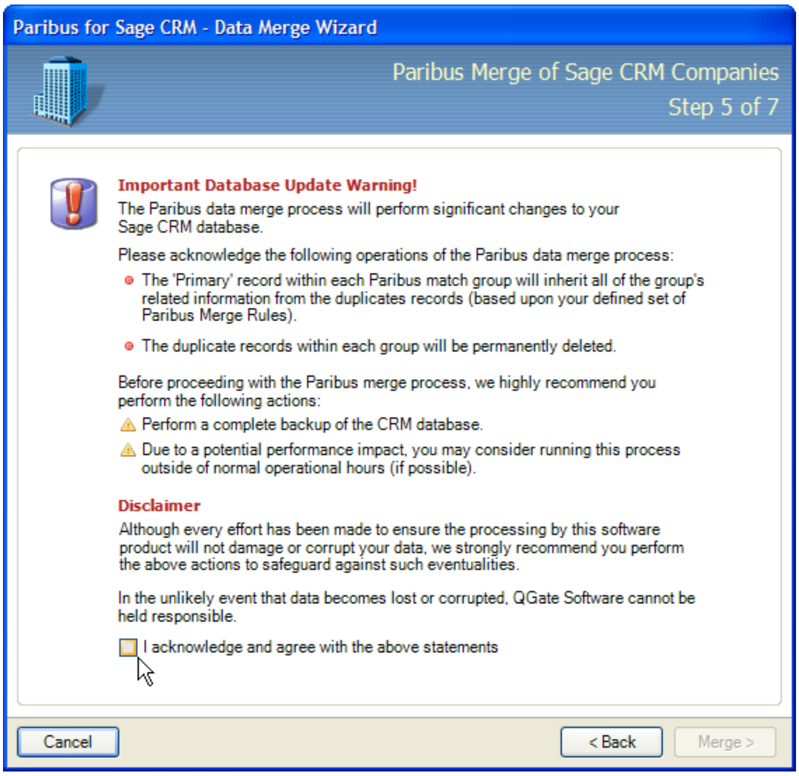


Figure 28 - Database Update Warning

Confirmation that the warning outlined in this page is acknowledged and understood is required by the checking of the confirmation checkbox. Once checked, the **[Next >]** button will become enabled.

Click the **[Next >]** button to continue.

Step 6: Perform Data Merge

Paribus will now commence the data merge process for all Duplicate entities identified in the Match Results used (Figure 29).

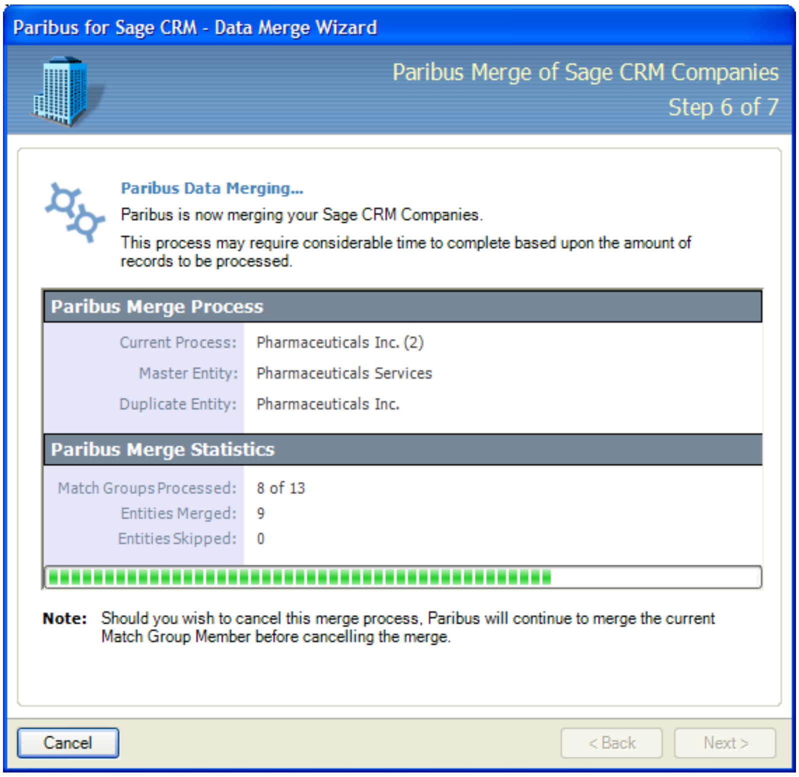


Figure 29 - Data Merge in progress

Note: The data merge process may require considerable time to complete, depending on the amount of records that need to be processed. There may also be a performance hit on the Sage CRM server being processed, so you may wish to perform the data merge while no other users are logged in.

Step 7: Data Merge Summary

Upon completion of the data merge, Paribus for Sage CRM will present a detailed summary screen, with merge statistics and an audit of actions taken (Figure 30). If there were any problems during the data merge process, they will be identified here.

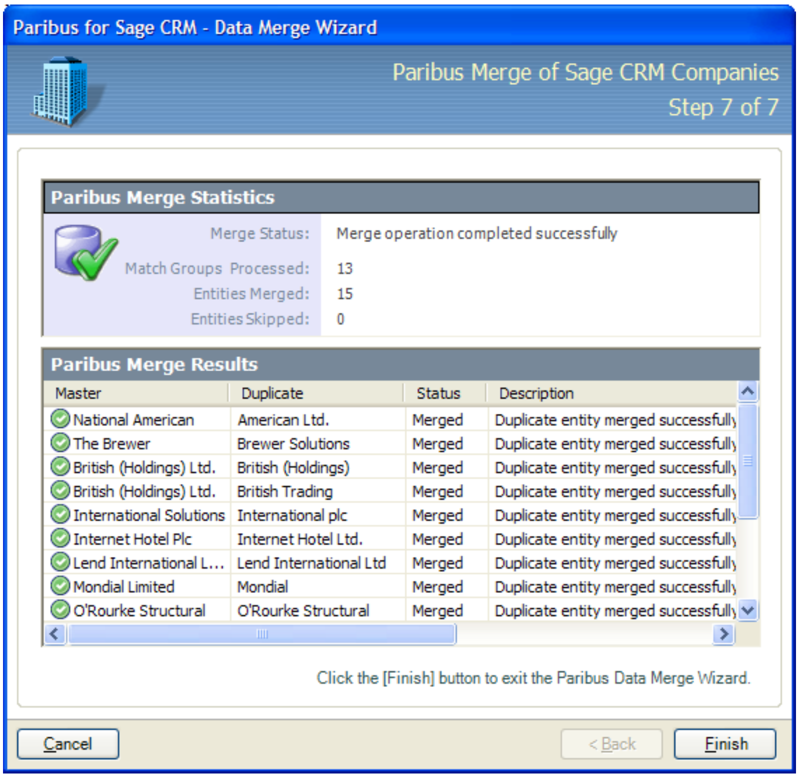


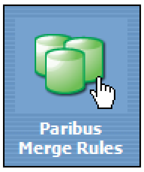
Figure 30 - Data Merge Summary

> *Note: Unfortunately the audit log cannot currently be saved or printed, but future releases of Paribus for Sage CRM will support these features.*

Merge Rule Management

Paribus for Sage CRM provides the ability to merge duplicate Sage CRM Companies and People into a single master Company/Person record. This is achieved through a series of Paribus Merge Rules, which define the data relationships and the data by which to merge.

Paribus Merge Rules must be defined before any merge operation can be performed and are uniquely defined for each Sage CRM database.



To manage Paribus Merge Rules, simply click on the **Paribus Merge Rules** icon (see opposite) from the Main Menu screen.

This will display Paribus Merge Rule information in the right-hand pane (Figure 31).

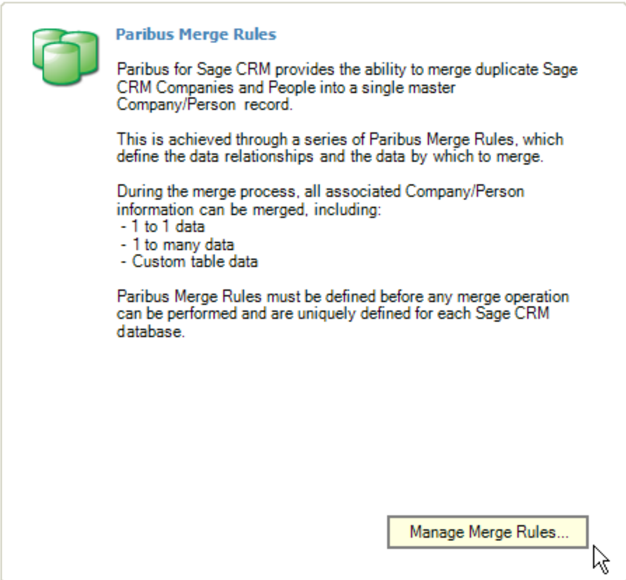


Figure 31 - Paribus Merge Rules

This page describes Paribus Merge Rules and their usage in the Data Merge process. To manage Paribus Merge Rules (Page 54), click on **[Manage Merge Rules…]**.

> *Note: When you first visit the Merge Rules Management screen, Paribus for Sage CRM will automatically launch the "Establish Merge Rules" wizard (see Page 57) to help you to populate your list of Paribus Merge Rules.*

Managing Paribus Merge Rules

Paribus Merge Rules define the relationships to associated tables that you wish to include as part of an entity (Company/Person) merge operation. The Manage Paribus Merge Rules page (Figure 32) allows you to control which Merge Rules should be used for all data merge operations.

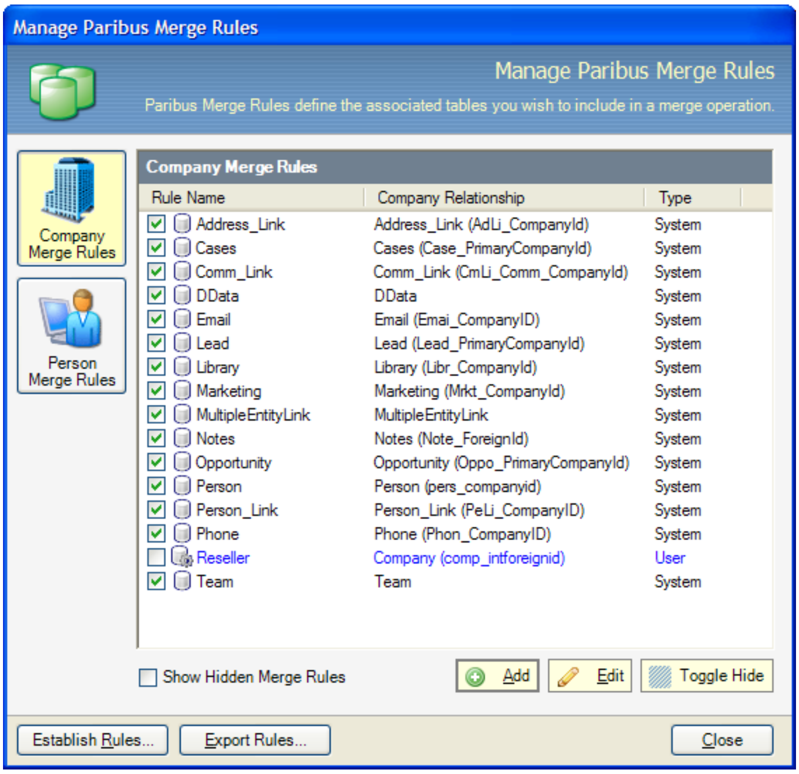


Figure 32 - Manage Paribus Merge Rules

There are two types of Paribus Merge Rules: System and User. System Merge Rules have either been established by auto-analysing the Sage CRM database, or by using the pre-defined "default" Merge Rules. User Merge Rules are any that have been added manually by the user. The types are distinguished in the list by colour: System in **black** text, User in **blue**.

<u>Other functions:</u>

- To find out how to "Add/Edit Paribus Merge Rules", see Page 56.
- To establish (auto-analyse or import) Paribus Merge Rules, click on **[Establish Rules…]** (see section "Establishing Paribus Merge Rules", Page 57 for more information).
- You can also export your set of Paribus Merge Rules to a Merge Rule Definition (.MRD) file by clicking on **[Export Rules…]**.

Switching Paribus Merge Rule Display

By default, Company Paribus Merge Rules are displayed initially. To change which “relationship” of Paribus Merge Rules to manage, simply click on appropriate the icon on the left-hand side. For example, to switch to Person Merge Rules; simply click **[Person Merge Rules]**.

Enabling and Disabling Paribus Merge Rules

Each Paribus Merge Rules can be enabled or disabled as required using the checkbox next to each Merge Rule. If a Merge Rule is not checked, it will not be used as part of a Data Merge operation.

Hiding Paribus Merge Rules

If there are any Paribus Merge Rules that you don’t ever want to use in a Data Merge operation, then you can hide it by selecting it and clicking **[Toggle Hide]**. Hiding a Paribus Merge Rule removes it from the list of available Rules so that it can’t be enabled by accident. Hidden Rules are not permanent, as you can always click “Show Hidden Merge Rules” (Figure 33) to see them, where you can “Un-hide” them again by selecting them and clicking **[Toggle Hide]**.

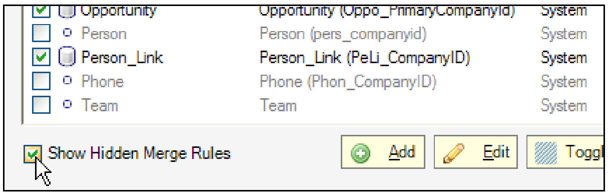
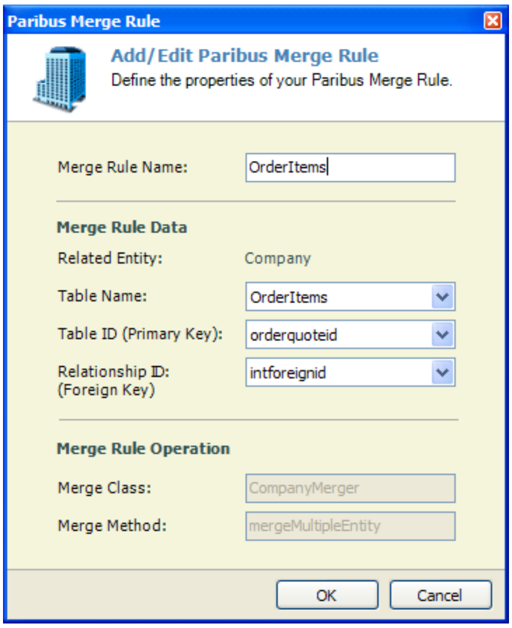


Figure 33 – “Hidden” Paribus Merge Rules

Add/Edit Paribus Merge Rules

To edit an existing Paribus Merge Rule, simply select the Merge Rule you wish to edit from the list, and then click **[Edit]**. To add a new Merge Rules, simply click the **[Add]** button. This will open the Paribus Merge Rule editor (Figure 34).



Merge Rule Name: Rule Display name

Table Name: The Table related to entity

Table ID: Primary Key for **Table Name**

Relationship ID: Foreign Key relating Entity to **Table Name**

Figure 34 - Add/Edit Paribus Merge Rule

Depending on the type of Paribus Merge Rule (System or User), is what you will be allowed to change:

- **User** Paribus Merge Rules (created manually) allow you to change the Merge Rule Data.
- **System** Paribus Merge Rules can only be renamed.

Establishing Paribus Merge Rules

When using the Paribus for Sage CRM plug-in for the first time, you will be given the choice of how to establish your list of Paribus Merge Rules (Figure 35).

There are a few options available, all of which allow you to populate your list of Paribus Merge Rules.

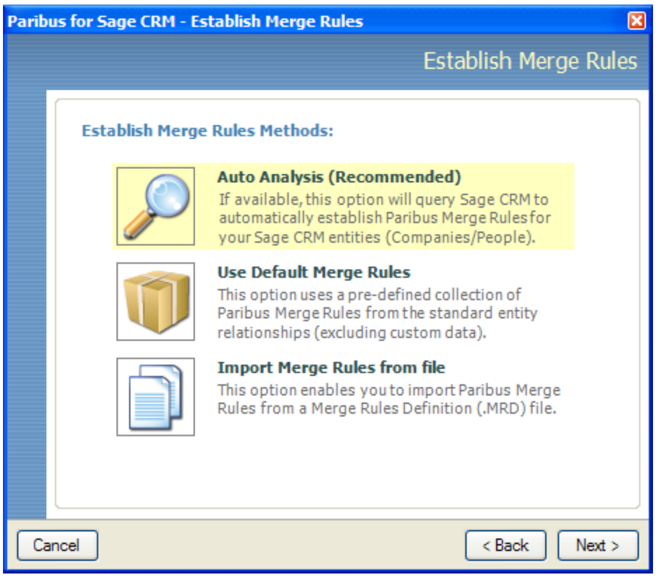


Figure 35 - Establish Merge Rules Methods

Option 1: Auto-Analysis

This option will query Sage CRM to automatically establish Paribus Merge Rules for your Sage CRM entities (Company/People), which also includes Custom entities. This is the recommended option to setup your Paribus Merge Rules as it will also reflect any Sage CRM customisations.

Note: If the option to Auto-Analyse is not available, this is because an optional step was skipped during the installation of the "Paribus for Sage CRM Support Component". Please see the section "Pre-Requisites", Page 9 for more information.

After you have selected the "Auto Analysis" option, click **[Next >]** to start the Merge Rule import/establishment process (Figure 37).

Option 2: Use Default Merge Rules

This option populates your list of Paribus Merge Rules using a pre-defined set from a standard Sage CRM installation. However, because it does not analyse your Sage CRM installation, it will not reflect customisations to Sage CRM (if any).

After you have selected the "Use Default Merge Rules" option, click **[Next >]** to start the Merge Rule import/establishment process (Figure 37).

Option 3: Import Merge Rules from file

This option allows you to import Paribus Merge Rules from a (previously exported) Merge Rule Definition (.MRD) file. These MRD files can be created by using the **[Export Rules…]** button from the Manage Merge Rules screen.

On the next screen you will be asked to **[Browse]** for the .MRD file that you would like to import Merge Rules from (Figure 36).

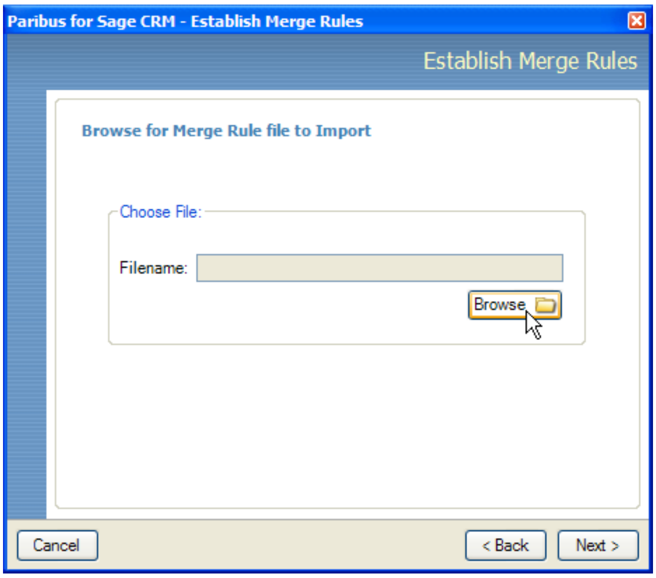


Figure 36 - Browse for Merge Rule Definition (.MRD) file

Once you have chosen the file to import from, click **[Next >]** to start the Merge Rule import/establishment process (Figure 37).

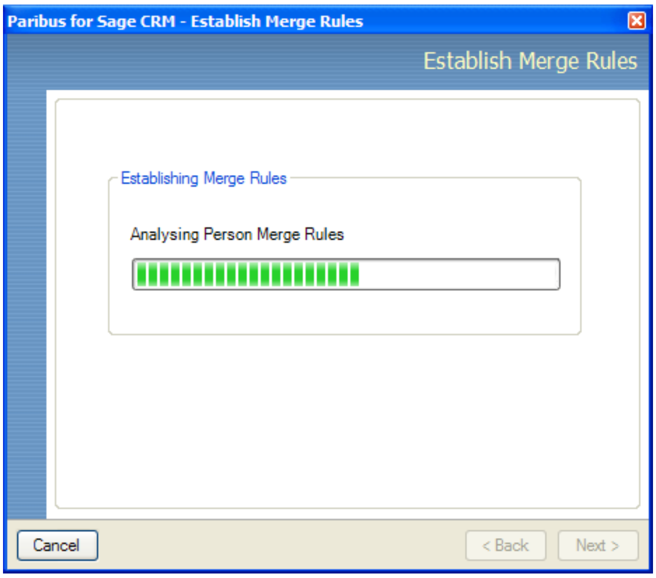


Figure 37 - Establishing Merge Rules...

After establishing your Paribus Merge Rules, you will be presented with a summary screen (Figure 38).

Note: It is important that you take a moment to review your Paribus Merge Rules, regardless of the method used to establish them. Merge Rules define entity relationships for Paribus to merge data by; therefore failure to correctly define your Paribus Merge Rules could potentially result in unintentional data loss.

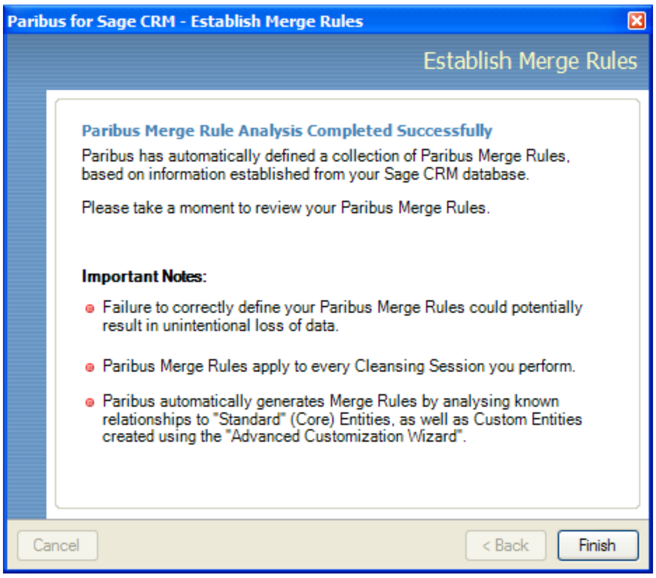


Figure 38 - Establish Merge Rules Complete

Upon clicking **[Finish]**, you will be taken back to the Merge Rule Management screen (Page 53), where you will see your updated list of Paribus Merge Rules.

Plug-in Settings

The Settings page allows you to configure aspects of the Paribus for Sage CRM Plug-in.

Currently this screen only allows you to configure the logging level, which determines how much information (Debug, Errors, Info…) get recorded to a “SageCRMPlugin.log” file, located in the Paribus application folder.

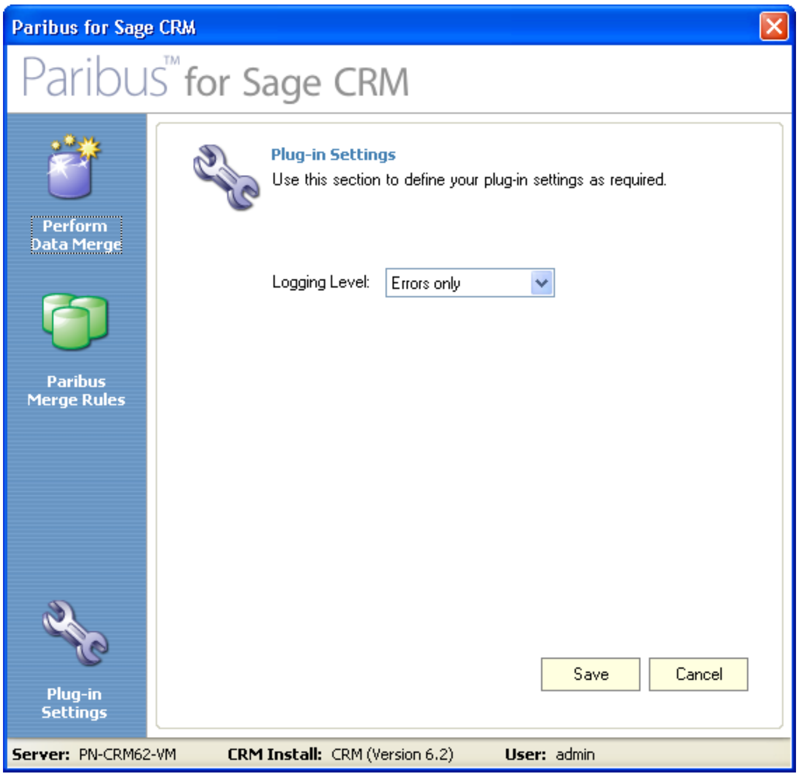


Figure 39 - Plug-in Settings

This can be useful for Technical Support departments who may want more information to determine any potential issues with Paribus for Sage CRM.